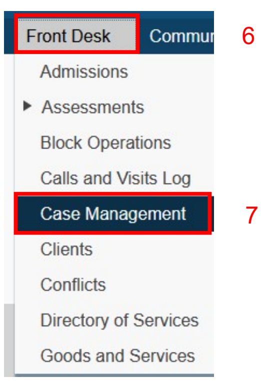
How to Add a Case Management Record

There are 4 components to a Case Management Record: Details, Sessions, Documents and Case Comments. Once the Details are added (i.e. the goal/desired outcome) then a user can navigate to any of the other 3 components to add associated records.

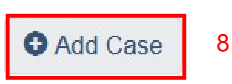
1. Log-in to HIFIS. If you need assistance see the Quick Reference Guide on "How to Log Into HIFIS and Change Service Provider".

NOTE: There are no steps 2 – 5, continue to step 6.

There are two different means by which you can add a Case Management: 1) using **Front Desk** or 2) **searching the client**. Both accomplish the same result and boils down to preference; however, if using the Front Desk method, the user should know for certain which record in HIFIS represents the client. **First are the steps using Front Desk.**



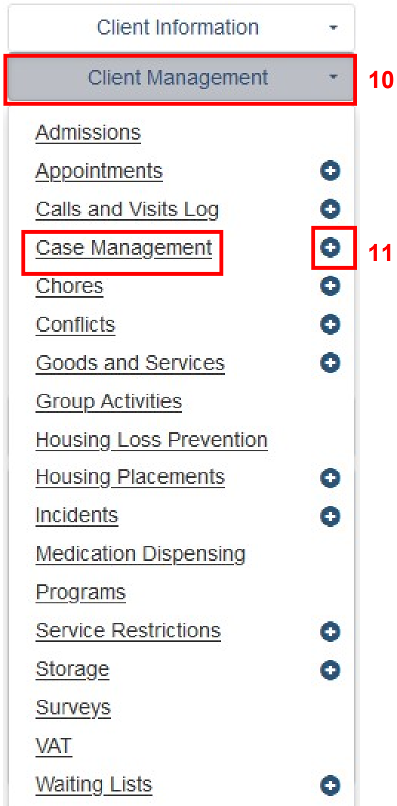
6. Select **Front Desk.**
7. Select **Case Management**.



8. Click the **Add Case** button on the **Case Management List** screen.

Second are the steps searching the client.

9. After searching and finding the client, on the **Client List** screen select the client record that you want to add a Case Management to by clicking on the name of the client.



10. Select **Client Management**.

11. Select **Case Management** and then click the **Add Case** button on the next screen **or** click the + icon.

Both methods above accomplish the same results and bring you to the fields described below for completion. By using **Front Desk** you would need to search for the client in step 12 below because you have not yet identified the client, whereas by first **searching the client** you will not be presented with a Client Name field and you would start at step 13 below and complete the remaining fields.

12. Search and select the client when Front Desk is used, otherwise continue to step 13 if searching the client was used.

13. Select the **Caseworker** working with the client from the drop-down list.

14. Select the **Goal** (desired outcome) the client is trying to achieve from the drop-down list.

NOTE: If there are several goals/desired outcomes that are being pursued by the client, a Case Management record must be added for each.

15. Leave the **Status** field as **Open**.

16. Edit the **Start Date** when the Case Management for the goal began.

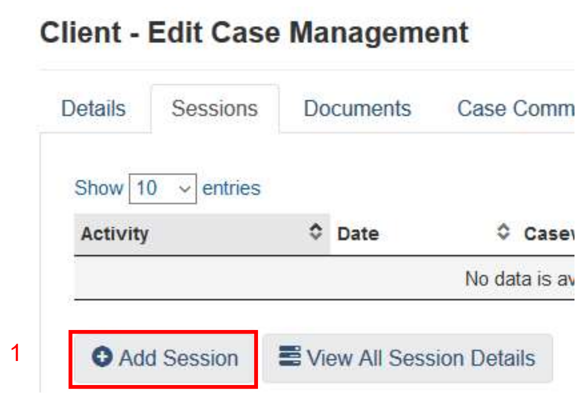
17. Select the **Program** funding the service for the client.

NOTE: If multiple values are available for Program only one value must be selected.

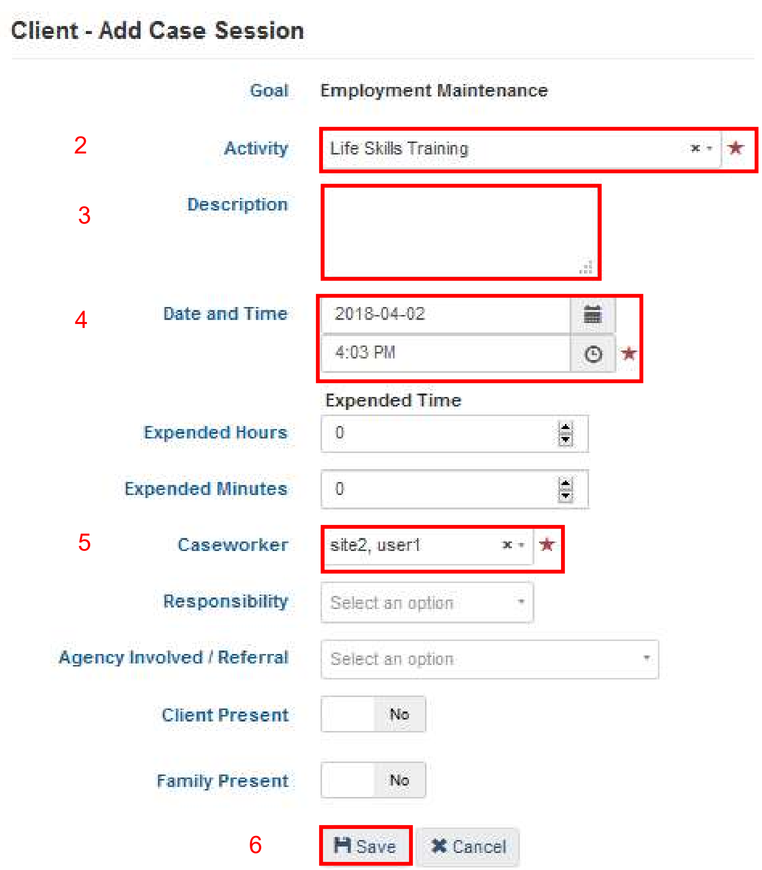
18. Select **Save** to complete the creation of the Case Management record.

Entering a Session

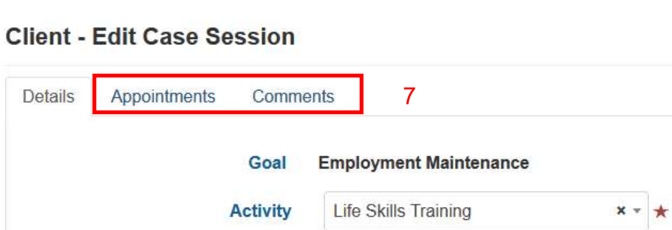
A Session may be added within each Goal or, if the client has multiple goals, a Session may be added for multiple goals from the Case Management List screen. This Guide Sheet will only discuss adding a Session within a Goal.



1. Click the **Add Session** button on the **Client – Edit Case Management** screen.



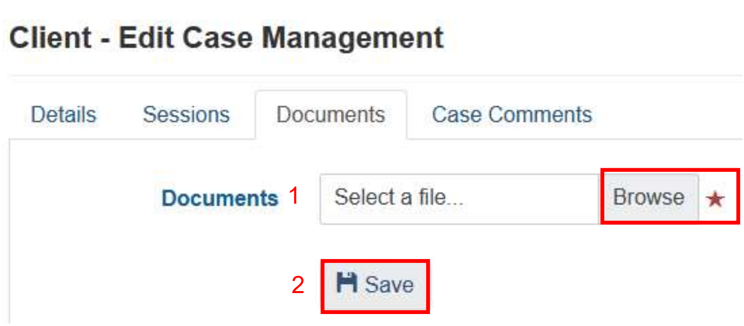
2. Select the **Activity** from the drop-down list. The list of options is dependent on the Goal.
3. Optional: Enter a **Description** of the Session.
4. Enter the **Date and Time** of the Session.
5. Select the **Caseworker** who conducted the Session from the drop-down list.
6. Select **Save** to complete the creation of a Session with the client toward the designated Goal.



7. After saving a Case Session and going back to Edit the Session a user will be presented with tabs for Appointments and Comments into which additional details about the Case Session can be added.

Entering a Document

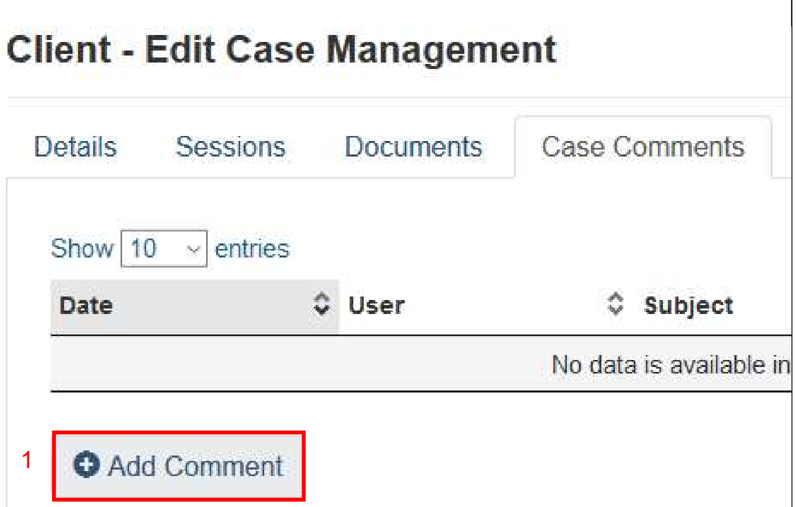
Documents related to a Goal and/or the client may be added to a Case Management record. Such documents are only accessible by users with rights to the Service Provide (HIFIS site).



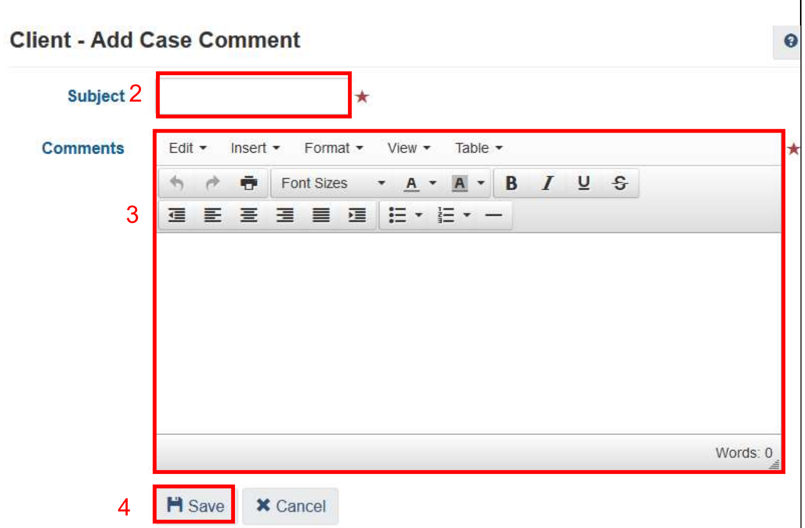
1. Click on **Browse** to find the document to upload to HIFIS.
2. Click **Save** to upload to HIFIS.

Entering a Case Comment

Additional thoughts or observations regarding the Case Management record may be added in Case Comment.



1. Click the **Add Comment** button on the **Client – Edit Case Management** screen.



2. Enter the **Subject** of the Comment.
3. Enter the **Comments**.
4. Select **Save** to complete the creation of the additional Comments for the designated Goal.